

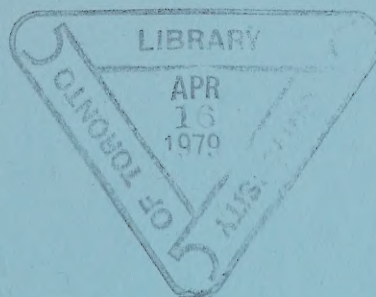
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MUNICIPAL STAFF REPORTS




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INTRODUCTION

This bulletin has been prepared in response to requests from municipalities for administrative procedures to help staff and councils efficiently handle ever-increasing workloads.

The subject affects every municipal clerk and other senior member of staff of a municipality - namely, the preparation of reports for council's consideration.

This bulletin and sample report deals with the layout or format of reports. It is not meant to be a guide for writing style or content.

The practices of several municipalities have been considered in selecting the format used in the sample at the end of this bulletin.

BENEFITS

Before reviewing the sample report and discussing its various sections it may be appropriate to highlight some of the benefits that are cited by those municipalities that use this or similar methods.

The purpose of most staff reports to council is to convey sufficient information about a matter for the council to reach a decision. The time in which decisions are reached can be improved by ensuring that staff reports contain clear and concise statements of the problem, alternatives, impact on policies and finances, and recommendations.

Generally, reports submitted to council contain these elements but do not organize them in the most logical and convenient manner for council's use. Councillors will find it easier to deal with the number of reports found on most agendas when the format used for each report is the same. They can readily pick out sections of particular interest, especially during debate on the report when they want to refresh their memories.

The format used in the sample merely highlights and sets down in a logical sequence the components or elements that are found in good reports.

Another advantage of adopting a standard format that includes current policies on the matter and financial considerations is that these matters are not overlooked in reaching a decision. Even if there is no current policy, or the recommendations have no financial impact, the report should state that. This assures council that staff has checked these areas carefully.

A further benefit in having a reporting format that includes recommendations is that council's discussion can be focussed and a decision reached more quickly.

There are also administrative advantages. For example, standard headings and layouts make it easier to train new employees who draft or type reports for submission to council.

Those municipal staffs that use a standard format have benefited as well in the eyes of their councils because of the more professional image projected by the concise presentation of often detailed and complex matters.

STANDARD REPORTING ELEMENTS

The format in the sample uses standard headings that should appear in every report. These headings are set out in the left margin to enable councillors to locate any of the standard areas readily. The headings used are: Subject

Origin

Analysis

Existing Policy

Financial Considerations

Recommendations

The sample also suggests that identifying information, like file references, be indicated. The report writer usually must research the material for his report and in so doing is likely to refer to letters or reports from other departments or agencies. This material usually includes their file numbers and it is beneficial to include these numbers along with the report writer's file number at the upper right-hand side of the page. This little step can go a long way to easing the filing load and ensure proper filing of the report.

At this point we can review each of the headings used in the sample report and what is contained under those headings.

(a) Subject

This is usually the title by which the report will be known. A very few descriptive words will serve to identify the subject of the report and it is helpful in tracing the history of a matter when the same title is used each time it is brought before council.

(b) Origin

The next thing the reader would want to know is why the report has been written. Did it originate in the writer's department, at council's request, or as the result of a request or problem identified by a private citizen or outside agency? In the latter case the material (letters, requests, petitions) should be attached as an appendix to the report.

In effect this section is a very brief statement of the problem and who wants council to consider it.

(c) Analysis

This is the meat of the report. It is here that the writer sets out in some detail the situation that requires a decision by the council. Many report writers find it advantageous to present the information under sub-headings, especially when there is a great amount, to facilitate the reader's review of the section. As stated earlier it is best to break up lengthy sections for easy reference during council's discussion of the report. These sub-headings are dictated by the subject and are not standardized or set out in the left margin as are the main headings.

Councillors will invariably ask whether or not particular persons, departments or agencies have been consulted during the preparation of the report to ensure that no one is overlooked. This information when provided takes the form of a sub-heading under the 'ANALYSIS' section rather than forming a separate standardized heading.

(d) Alternatives

This heading is now being used in many reporting formats.

A review, perhaps abbreviated, of the alternatives that the writer considered and why they were rejected is helpful. Council can then quickly see the writer's reasoning and need not spend valuable time during council meetings discussing impractical or impossible alternatives that have already been considered. On the other hand, the reasons for rejecting an alternative are more easily debated and questioned when they are included in a written report.

(e) Existing Policy

Decisions are usually influenced by what has happened in the past. After the analysis of the problem, council will want to know what was done previously in similar circumstances and reports should include this information at this point. Prior knowledge of the existing policy may have an effect on their consideration of the financial information and recommendations which follow.

The setting out of existing policy or previous practices in the report also tends to reduce the number of occasions where exceptions are made to existing practices. Of course, council may choose to make an exception but should at least be aware that it is doing so.

(f) Financial Considerations

It is at this point in council's deliberations that they are ready to consider the financial impact of the various alternatives discussed previously. Occasionally, decisions are made without full consideration of what may be far-reaching financial implications.

This section should consider:

- current and capital budget
- manpower costs
- material cost
- recurring future maintenance costs
- subsidies

With current spending restraints, the highlighting of the financial impact of decisions and their inclusion in a standard format is vital.

(g) Recommendations

It is imperative for council's consideration and resolution of a problem to have clear recommendations from its professional advisors (staff). Staff should not duck contentious issues where they know the council is split; there should be a solid recommendation for council's consideration.

It may not be accepted, but it will provide a focus for debate and avoid delays while council tries to formulate a recommendation or hear oral recommendations from staff. Oral recommendations can be misinterpreted and the resulting decision may not be worded in the most effective manner for staff action.

All recommendations should be written in a form suitable for a resolution.

During the discussion of the problem throughout the report, certain solutions may be obvious and logical. They may even be discussed briefly. If they were left as they fell, the reader would have to search the entire report for solutions and recommendations. That is one reason they are gathered together and highlighted in a clearly labelled section.

Also, many times a member of council either will be fully aware of the subject or will be unable to read the report in advance of the meeting and only be interested in the recommendations. It also aids discussion during meetings when a councillor does not have to search through the body of the report for a particular recommendation.

In the sample the recommendations appear at the end as a logical conclusion to the preceding discussions in the report; however, many report writers prefer to highlight the recommendations at the beginning of the report, especially when the report is rather lengthy.

* * * * *

The material discussed in this bulletin is merely a repetition of the suggestions for good report-writing techniques found in many texts. The adoption of this or any similar format should go a long way to ensuring availability and consideration of the necessary information for informed and judicious decision-making by council.

SAMPLE FORMAT FOR STAFF REPORTS

NOTE: This sample is presented to illustrate format and is not intended to be technically accurate. Attachments referred to in the sample are omitted as they do not affect the format.

TOWN OF _____

September 25, 1978

File Clerks - 8.78.
 ENG - PN.12.77

TO: The Mayor and Members of Council
 FROM: Town Engineer
 SUBJECT: Speed Limit on Kent Street between
 Maple Avenue and Johnston Street

Origin

Letter dated September 15, 1978 (attached) from Mr. J.R. Brown, President of the Highlands Ratepayers Association, requesting a reduction of the speed limit on Kent Street from 60 km/h to 40 km/h due to hazard created by curve and entrance to school.

Analysis

Physical Condition The portion of Kent Street under consideration is a two-lane (8 m wide) macadam road with ditches 2 m deep on either side and has a total length of 2.2 km. There are 10 residential entrances (6 on south side) along this section of Kent Street.

The entrance to Kennedy Public School is located approximately midway along the north side.

Vehicle Survey A vehicles count and speed survey was conducted by the Police Department at the school entrance with results as follows:

<u>Date</u>	<u>Time</u>	<u>Avg. Vehicle Speed</u>	<u>No. of Vehicles</u>	
			<u>East Bd.</u>	<u>West Bd.</u>
Wed. Sept. 20	7 - 9:30 a.m.	57.3 km/h	25/min.	39/min.
Wed. Sept. 20	3 - 6 p.m.	56.8 km/h	40/min.	21/min.
Thurs. Sept. 21	7 - 9:30 a.m.	56.4 km/h	23/min.	40/min.
Thurs. Sept. 21	3 - 6 p.m.	57.1 km/h	38/min.	28/min.

Others Contacted The Traffic Safety Council and Ministry of Transportation and Communications were contacted during the preparation of this report. (See attached comments).

Special Factors There are two features of this section of road that warrant special consideration.

First, there is the school entrance at which buses and cars are making turns during the morning rush hours. This activity creates a rather high potential for accidents.

Secondly, there is a sharp curve immediately to the east of the school entrance which restricts the view of on-coming motorists. There have been three motor vehicle accidents at this location this year.

Summary There is a definite hazard involved and remedial action is required.

Alternatives

1. The curve could be reconstructed to eliminate most of the visual restrictions. The cost of the work would be approximately \$148,000.00.
2. The road could be widened in the vicinity of the school entrance to provide for an additional turning lane. This would remove turning vehicles from the main traffic lanes and reduce the potential for rear-end collisions. The cost would be approximately \$24,000.00.
3. Installation of a flashing amber light and sign warning of the school entrance at a cost of \$1,200.00.
4. Reduce speed to 40 km/h for 150 m in either direction from the school entrance in accordance with sec. 82(12) of The Highway Traffic Act.

Present and projected traffic volumes do not warrant the reconstruction referred to in items 1 or 2 above.

Existing Policy

Council approved by resolution number 71, passed October 21, 1973, that the speed limit on roads with fewer than 10 residences per kilometer be 60 km/h.

Financial Considerations

Funds including subsidies are not available in 1978 for alternatives 1 or 2.

There are funds in the roads maintenance budget to provide for the construction of the works described in alternative 3. The cost estimate is based on use of municipal staff and equipment.

Alternative 4 represents a minimal expenditure in the form of staff time to change the road signs.

Recommendations

1. That the speed limit on Kent Street 150 m on either side of the school entrance be reduced to 40 km/h.
2. That a flashing amber light and sign be installed by a municipal crew on either side of the school entrance at a cost, including staff time and materials, not to exceed \$1,200.00 with completion by December 1, 1978.

CHAPTER IV

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